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ABSTRACT

This guide examines issues that should be taken into consideration by European universities when setting up an inter-university cooperation program for the first time. It contains a list of suggestions for the negotiation and preparatory phase of a student mobility program which, it is noted, is founded on the experience of numerous European Community Action Scheme for the Mobility of University Students (ERASMUS) participants. Areas discussed include the following: (1) planning exchanges; (2) academic recognition; (3) preparing students for their departure; (4) the formalities to be prepared for on arrival at the host university; (5) student's reception upon arrival; and (6) the financial management of the support received. Advice, offered in a separate column on most pages, includes the following: universities should select students well in advance, aim for year-long exchanges, plan linguistic training well in advance, and provide advanced briefing. It is noted that the guide only deals with student mobility programs and does not repeat the rules governing the allocation of ERASMUS financial support found in the Guidelines for Applicants, published by the Commission each year. (GLR)

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Commission of the European Communities
Task Force Human resources, education, training and youth

Short Guide

for universities* in the European Community which would like to prepare thoroughly a new student mobility programme within the framework of ERASMUS

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* In the context of the ERASMUS Programme, the term "university" is used to describe all types of institution of higher education which are either public, or recognized or financed by the public authorities of a Member State.

SHORT GUIDE
for universities in the European Communities which would like to prepare thoroughly a new student mobility programme within the framework of ERASMUS

Published for the
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Task Force Human resources, education, training and youth

by

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The ERASMUS Bureau, an autonomous body of the European Cultural Foundation, assists the Commission of the European Communities in the implementation of the ERASMUS Programme

Preface

The ERASMUS Programme (European Community Action Scheme for the Mobility of University Students) was introduced in 1987 and has already made a substantial contribution to increasing student mobility within the European Community. Experience with the implementation of the Programme hitherto has shown that the good planning and preparation of interuniversity cooperation and student mobility is the most important precondition for their long lasting success.

In view of this, the Commission has considered it appropriate to draw attention to the main aspects which, in the light of experience so far, should be taken into consideration by universities when setting up an inter-university cooperation programme for the first time.

This is the purpose of the present guide, which has been prepared by Guy Haug on behalf of the Task Force : Human Resources, Education, Training and Youth of the Commission of the European Communities.

H.C. Jones
Director, TFHR

Introduction

This brief memorandum is intended for universities (rectors, presidents, faculty deans, heads of department, teaching staff administration, etc.) which are preparing to negotiate a student mobility programme in the context of ERASMUS with one or more universities in another Member State of the European Community.

It contains a list of useful suggestions for the negotiation and preparatory phase of a student mobility programme; these suggestions are founded on the experience of numerous ERASMUS participants.

This document does not repeat the rules governing the allocation of ERASMUS financial support which can be found in the *Guidelines for Applicants*, published by the Commission every year (document N° V/372/89 of April 1989 for the academic year 1990/91).

Only the student mobility programmes, which are the very essence of ERASMUS, will be dealt with here; but other cooperation activities can also benefit from financial support : teaching staff mobility programmes, joint curriculum development, intensive programmes, study and teaching visits, projects developed by university associations, etc.

* The Student Handbook, *Higher Education in the European Community*, published by the Commission, contains a clear and detailed presentation of the system of higher education in each of the twelve Member States of the Community. An indispensable reference work, it can be obtained from the Office for Official Publications L-2985 Luxembourg, price £11.95 (Stg).

The success of ERASMUS depends on the good organization of exchanges

The ERASMUS programme furthers **organised** student mobility between universities in the various Member States within the framework of Interuniversity Cooperation Programmes (ICPs).

Those universities which want to establish organised mobility programmes therefore play a **major** role in the development of ERASMUS : that of negotiating and carefully preparing the organisation of the programme and the integration of the students. Care should be taken above all to:

Careful planning and negotiation are the secret of success

* Select the partner institution :
  - look beyond the institutions which, at first sight, appear most similar to your own; the best exchanges are often those with a partner who can offer different possibilities to those already at your disposal;
  - do not focus on a partner who is already in great demand: the more your cooperation is worth in the eyes of your partner, the more successful it is likely to be;
  - but do not diversify your efforts too much: intensive cooperation is not possible with too many partners, and it is often advisable to begin with a bilateral agreement, in which other institutions could be invited to participate later on.
* Go into details regarding the planned exchange; an agreement in principle and mutual goodwill are not enough: they only make it possible to **start** preparing for the mobility programme.

Long-standing cooperation depends on mutual confidence

* Allow yourself time: ERASMUS is a permanent programme and experience has shown that well negotiated agreements develop whilst those which are not sufficiently clear encounter difficulties. Reciprocal trust, the indispensable prerequisite and cornerstone of all cooperation, can usually only be established among people who know one another well and is therefore not apparent right from the initial contact. In certain cases study visit grants can be awarded (Guidelines for Applicants, Section III.1) for a first preparatory visit.

Make use of your freedom within ERASMUS !

The universities' responsibility in the organisation of the programmes would be meaningless were it not accompanied by **considerable freedom**:

Exploit the scope for flexibility

- ERASMUS leaves it to the universities to negotiate their exchanges: the only absolute condition imposed upon the universities is that the study period in the host university must be of a substantial duration and be fully recognized by the student's home university.
- ERASMUS also allows universities receiving financial support great flexibility in the allocation of funds; financial support provided by the Commission can be used to cover "all expenses directly related to the implementation or development of the mobility programme".

These arrangements are those indicated in the "Guidelines for Applicants" (Section I.2). They are wide-ranging. They leave room for initiative and imagination. Universities: **make the most of this!**

❑ Make sure you receive the support of the necessary allies !

Keep your colleagues well briefed

Inform the other people involved about your plans and your negotiations: central administration (Rector, President), ERASMUS coordinator (if your institution has appointed one), colleagues who are also involved in ERASMUS exchange programmes, accounting and financial services, etc., not forgetting the students themselves.

You will be all the more likely to receive their support or their cooperation if you keep them informed and ask for their opinion during the negotiations with your partner university.

❑ Detailed planning of exchanges

❑ Exact duration and dates of students' stays

It is absolutely essential to check the compatibility of the academic calendar in detail from the very **beginning** of the negotiations: the students' stay should correspond to a complete academic unit of the host university, and not only of their home university. This factor often proves decisive for the success of the exchanges:

- students who do not arrive until after the beginning of term are always placed in a very difficult situation (problems of settling in and integrating, reduced academic benefit, increased risk of failure in examinations);
- it is always difficult to give grades for students who disappear before the final examinations.

Aim for year-long exchanges

Contrary to what one might think a priori, it is in fact easier to organise exchanges which last **one academic year** (a concept which exists in all universities) rather than one term or one semester (which presupposes that the divisions of the university year are compatible). Moreover, the same is true as regards accommodation, which is an even bigger problem for students arriving in the middle of the year (or semester).

When will the flow of students in both directions begin for the first time? It is better to start a little later, but on a sound and well defined basis... In multilateral programmes it is not essential for all the student exchange flows to begin in the same year.

❑ Student selection

Select students well in advance

- how many students will go in each direction?
- which students are eligible to go abroad? What stage in the course of their home university should they have reached? Must they have obtained minimum grades in certain subjects? What level of language proficiency should they have? (For the criteria governing the allocation of ERASMUS grants see *Guidelines for Applicants*, Section II.1. It is important to remember that in general it will not be possible to award an ERASMUS grant to all students.);
- who selects the students? It is often a good idea to allow the home university to select them and to **put forward their names**, but for the final admission to be decided by the

host university. In any case, the list of students' names should be fixed well before departure and communicated to the host university.

❑ Reciprocity

What reciprocal services should be offered by the universities involved?

Well balanced exchanges

- An absolute balance is not indispensable, but all the partners must be satisfied with the balance between what they have to provide and what they will receive from the others.
- Reciprocity does not necessarily involve exchanging the same services: each university can offer whatever corresponds to its strong points, but a list of what each university will provide should always be laid down in advance. It is perfectly possible, for example, to send teaching staff or students on practical assignment or placement, and receive students in return.
- If reciprocity is not possible in the same subject area or at the same level of studies, there is nothing to stop it being sought elsewhere. For example, a university may welcome final-year history students and send second-year physics students, assuming, of course, that the steps taken are coordinated with the central administration of the institution and with colleagues in other disciplines.
- The overall balance of the cooperation agreement also affects the distribution of the ERASMUS funds which the ICP may receive. This point needs to be discussed with the central administration of one's own institution and with the partner institution.

❑ Academic recognition

❑ Activities of the students at the host university

Attention to details

- exactly which courses (or seminars, or tutorials) does the student have to follow at the host university? Who decides this? Can the student choose between various formulas? If so, does this choice have to be approved by the home university? Will the student have to take tests or examinations on arrival at the host university for admission to certain courses?
- How will students be assessed? Which examinations or papers will be marked by the host university? How will the grade given by the host university be "translated" into the grading system of the home university (drawing up of a conversion table, or second grading on the basis of the comments provided by the host university)? Or will a system of joint examinations, involving two staff members (one from the host university and one from your own institution) be implemented?
- How will the student follow-up abroad be organised: special tutoring at the host university? Visit by a staff member from the home university? Who should students go to if they have problems (academic or otherwise)?
- when the stay abroad includes a placement or practical work, who is responsible for finding the host company or administration? Must the placement be approved by the home university in advance? Who signs the placement contract with the company (the host university or the home university ?) What questions of insurance or social security arise from the placement?

❑ Academic recognition by the home university

Choosing courses...

- for which course units normally required by their home university will the students obtain equivalence (or validation, or exemption) upon their return? (The reply to this question requires a certain amount of flexibility on the part of the universities involved: it is impossible to find an exact equivalent of one's own course at another institution, and there is nothing to stop a 7th semester course at one institution being recognised as an equivalent for a 9th semester course at another).

... exams ...

- What are the conditions? Is recognition granted automatically (if students have followed the courses at the host university) or on condition that they have obtained a minimum grade at the host university? A monitoring examination cannot normally be imposed by the home university, except during the "running in" phase of a cooperation agreement. In this case, what exactly will this examination test : the syllabus of the home university or that of the host university?

... gratifications ...

- is the study period abroad accorded concrete recognition in the form of a diploma or a certificate (from the host university, the home university, or both together)? Is this stay abroad mentioned on the degree/diploma issued by the home university to students who complete the study course? What academic and professional value do these diplomas, certificates or other attestations have?

... and possible extension of study abroad

- in which cases and under which conditions could students, who so wish, extend their stay at the host institution in order to obtain the degree/diploma awarded by this institution?

❑ Preparing students for their departure

❑ Language preparation

Plan linguistic training well in advance

Generally speaking, the language preparation of students who are to participate in a mobility programme should be organised by the universities involved. They may use ERASMUS financial support awarded by the Commission for this purpose once the ICP is approved.

It is up to the universities to decide what means are to be used to guarantee language preparation for the students. Examples:

- level tests to discover the students' real needs or assess their ability to study abroad;
- learning or progressively improving knowledge of the language of the future host country, starting sometimes one or two years before leaving. For this kind of language preparation which is spread over a long period, the university can integrate interested students in existing language courses, or organise specific courses;
- intensive courses (in the home country or in the host country, before actual departure or upon arrival at the host university). Such intensive courses could take the form of several preliminary stays in the host country, spread over a period of time and beginning one or two years before departure.

The university may entrust language preparation to :

- its own staff members;
- external teaching staff on the basis of a special contract;

Choosing the best languages teachers

- foreign teaching staff (if possible from the partner university) and in particular on a reciprocal basis: each university taking charge of the preparation of the students from the other university before their departure;
- an external organisation (particular for less widely taught languages, for which the number of courses available is limited);
- the student himself (the university covers the costs of registering for a course, but lets the student choose a training institution).

None of the formulas above is excluded from the expenditure authorised within the framework of ERASMUS, which gives the universities wide scope for initiative to choose the most suitable formula (*Guidelines for Applicants*, Section I.2).

The language preparation of students is a field of activity where cooperation with other colleagues, who are also responsible for a mobility programme, often provides highly advantageous solutions (for example, intensive courses common to different programmes at the same university or even at different institutions in the same region). Compare the language training needs of your students with those of your colleagues, and coordinate your efforts with those of your central administration !

❑ Information for students before their departure

(on the academic, practical, organisational and financial conditions of their future stay, the continuity of their national grants, etc.) can be provided by :

Advance briefing is vital

- the home university;
- a representative from the host university, often better placed to both answer very specific questions (on the infrastructure available, accommodation, the style of teaching etc.) and then to help the students when they arrive in the host country;
- those students who have already participated in the exchange programme and who are better placed than anyone to provide information for candidates of the following year, particularly with regard to all the socio-cultural and practical aspects. A list of written recommendations, sent to each generation of students by the previous one, could be prepared in stages, accumulating the experience of all concerned.

❑ Social security and insurance

Play safe !

- information for students on Community procedures regarding Social Security (E111 form, or re-registration in the host country) and on the additional insurance cover required or advised: formalities to be completed and costs to be foreseen.

❑ Formalities to be prepared for on arrival at the host university

Plan for administrative formalities

- what status will students have at the host university ?
- what official documents will they need to register at the host university on arrival and

to satisfy the demands of the local authorities (police, local government, etc.)?

- are there any additional costs to be allowed for?

Students' reception upon arrival

Accomodation

Most of the programme directors consulted believe that this question is absolutely essential. It is an important factor in determining the success or failure of the study period and may even dissuade some students from setting off if not solved satisfactorily. This question should, therefore, in general be dealt with well **before** the students' departure.

ERASMUS students need a roof !

How will the host university assist students in finding suitable accommodation quickly when they arrive? The following help could, for example, be provided:

- exchange of accommodation between students moving between two universities (if the dates coincide and the students concerned agree...)
- a room already reserved in a university hall of residence or even in non-university accommodation, by the host university's accommodation service
- search for accommodation for ERASMUS students who arrive on campus entrusted to a group of local students (who could be "paid" for this service using the funds from the ERASMUS support granted to the ICP concerned)
- the university could bear the cost of the deposit or guarantee which these students would have to pay (using the funds from the ERASMUS grant), to help students settle in (university recovers these funds at the end of the lease and asks each student to pay sums not recovered due to damage, etc.)
- temporary accommodation provided by the host university (or by local students) for about ten days, to give incoming students time to find permanent accommodation.

Integration of students

Help students feel at home

- organisation of a period of integration at the expense of the host university (this formula only seems to be of benefit, however, if it brings the incoming students into contact with the local students with whom they will subsequently be studying; a welcome week bringing together all students arriving from different places may handicap integration if this group of students remains isolated from the local students).
- integration of students into the various "social" activities at the host university: the host university could, for example, advance the necessary sum, or even bear the cost of the subscription fees for membership of the sports association, the student council or union, and for use of the recreation facilities, the library, etc.
- language and socio-cultural integration entrusted to a small group of students at the host university who could receive a small "payment" for this (financed by the ERASMUS financial support).

❑ Financial management of the support received

❑ Presentation of applications for support and distribution of the funds received

Planning the distribution of financial support

The universities which are associated within an ICP should

- decide well in advance who will be responsible for submitting the application (and thus act as the "coordinating university" vis-a-vis the Commission) and what this application should contain;
- determine in advance the financial "rules": will the ERASMUS financial support be divided up as soon as the coordinating university receives it? If so, according to which rules? If not, which rules will apply to the management of a special bank account intended to receive these funds? Will expenses be paid immediatly by this account or reimbursed subsequently?
- provide mutual information on the procedures for awarding ERASMUS mobility grants in the various countries concerned, and encourage dialogue between those responsible for the ICP (in the various universities concerned) who have responsibility for allocating grants to students.

❑ Keep your accounts department/financial administration informed

Keep the appropriate financial departments of your institution properly informed

ERASMUS allows the universities great flexibility as regards expenses which may be funded by the support granted by the Commission. To avoid delays within the universities as far as possible, it is generally in the interest of those responsible for ERASMUS programmes to inform their accounts department and for financial administration in advance, thus enabling them to prepare for financial transactions which are still not common practice in most universities: transfers in ECUs or in foreign currencies, payments from/to other countries in the Community, possibly the payment in advance of certain amounts to facilitate operations or provide finance for students, etc.

An accountant will often be more willing to help if kept informed than if no-one takes the trouble to explain to him the special features of ERASMUS !

We hope that you will find this short guide useful and wish you fruitful negotiations with the partner universities of your choice